





Annual Market updates China

Submitted by AVIAREPS China
July 15, 2021

Market Overview

- **Economy:** China is an upper-middle-income country and the world's second largest economy. Its economy continues to steadily recover following GDP growth of 2.3% year during the pandemic year of 2020. It advanced 18.3% year-on-year in 2021 March quarter, accelerating sharply from 6.5% growth in the previous quarter and comparing favorably with market consensus of 19%.
- **Key Gateways:** Beijing (political capital), Shanghai (economic capital), Guangzhou (industrial capital), Shen Zhen(regional gateway)
- **Population:** In May 2021, China's 7th population census reported total population of 1.41 billion.
- **Outbound Tourism market:** Due to rising disposable incomes and affordable long-haul flights, the demand for international travel in China had surged in pre-Covid years. In 2019, approximately 169.2 million outbound journeys were recorded in China, up from 47.6 million in 2009. The majority of Chinese overseas travel was for personal reasons. Overall, a significant number of outbound tourists came from larger cities.

China Traveler Trends

Trend 1: Longing for Travel, but Health and Safety are the Priority

- The worldwide pandemic has made Health and Safety top priority factors for any trip planning.
- Long-time quarantine on home ground is pushing tolerance levels, and people long to travel and enjoy the outdoors.
- The pandemic has caused anxiety and resistance, so being immersed in nature is seen as a salve for mental health.
- Yearnings for less crowded, remote, long-haul destinations are getting stronger in China.

China Traveler Trends

Trend 2: Shift to Mobile

- The pandemic has accelerated the **adoption of mobile and digital tools**. In China, social media and new media are now major sources of inspiration and information for travel decisions.
- **Reach**: 1.3 billion mobile phones in China means 1 mobile for every Chinese on average
- **FIT means mobile**: most FITs use their mobile phone to book travel
- **Mobile Internet**: 753 million people use their mobile to access the Internet; 50%+ access 4G
- **Travel search & planning**: 80% of travelers are searching mainly online for information about destinations prior to booking and departure
- **Bookings**: 72% of online bookings through the Top 5 OTAs in China are done directly via mobiles; 81% of online hotel bookings are made on mobiles
- **Booking apps**: OTAs lead the way, with traditional TO/TAs playing catch up. Traditional travel agencies, especially those designing personalized trips, continue to be popular.

China Traveler Trends

Trend 3: FIT Soaring

- In certain areas, FIT represents **40%** of China travel and is rapidly rising
- **Semi-FIT (air/hotel packages)** represents an additional 40% of the market
- Age: 91% of travelers are **under age 44**
- Experience: **5.5 international trips**, on average
- Confident: **41% speak English**, 77% have Bachelor degree or above

China Traveler Trends

Trend 4: Affluent Segment Booming

- **Size:** 100 million affluent households within 3 years
- **Growth:** 17% annual spending increase v. 5% middle-class growth
- **Importance:** 81% of China's incremental consumption
- **Spend categories:** food, education and travel
- **Location:** 46% live in Tier 2 and Tier 3 cities
- **Booming Middle & Upper Class:** equates to booming luxury or unique travel, but there is now pandemic uncertainty and more cautious spending.
- **Exclusive Travel:** demand is growing for 5 & 6-star hotels, limos, helicopter transfers, private tours.
- **New Luxury Agents:** all major China tour operators have started Luxury Travel subsidiaries.

China Traveler Trends

Trend 5: Beyond the Gateways

- **Converging factors:** increasing travel experience, higher disposable income levels and greater sophistication are creating more demanding Chinese travelers, no longer satisfied with cookie-cutter itineraries and going beyond the gateways.
- **Been there done that, no more:** much like in the West, social pressure pushes sophisticated Chinese to “up” their peers and what were classic itineraries/destinations are no longer enough.
- **Attractive to Trade:** high-end Chinese travelers are less price sensitive. The higher the costs of tailor-made travel beyond gateways, the more appealing they are to Chinese travel trade.
- **Opportunities for lesser-known destinations:** the tailor-made itinerary trend is a big opportunity for lesser-known destinations and smaller attractions to serve the rich Chinese outbound market.
- **Long-haul and remote destinations:** Chinese outbound travelers are venturing further to long-haul and remote destinations.

China Traveler Trends

Trends 6: Younger Chinese Travelers

- Young professionals on high incomes are the major consumers driving outbound demand.
- The under-35 sector is the dominant force in China's consumer market.
- Under-35s will drive 55% growth in consumer spending over the next 5 years.
- By 2022, they will represent 53% of total Chinese consumption.
- Sharing travel experiences on online platforms is more popular among younger generations.
- The new wave of Chinese tourists want higher quality services and non-group experiences.

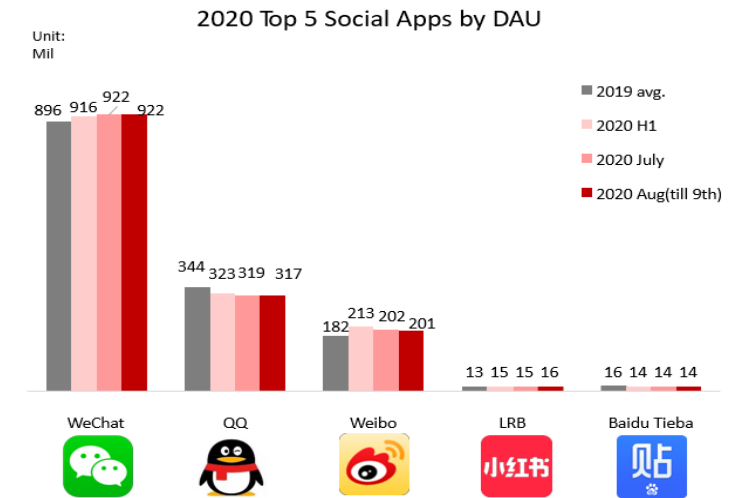
China Traveler Trends

Post Covid-19 Updates, Trends

- The recovery of international travel is likely to be gradual and lead by younger generations.
- Preconditions for additional border openings are likely to include mutual formal recognition of low-risk status, and transparent health data.
- 30% of Chinese tourists see online travel-related articles as important for choosing a destination.
- Travel experience ambitions vary according generations.
- Post-80s keywords include 'scenic area', 'self-driving route' and 'Bar'; GenZ, represented by post-00s, prefer offbeat, i.e. 'snacks', 'night markets,' 'landmark buildings' among keywords searched.

Digital Landscape of China Market

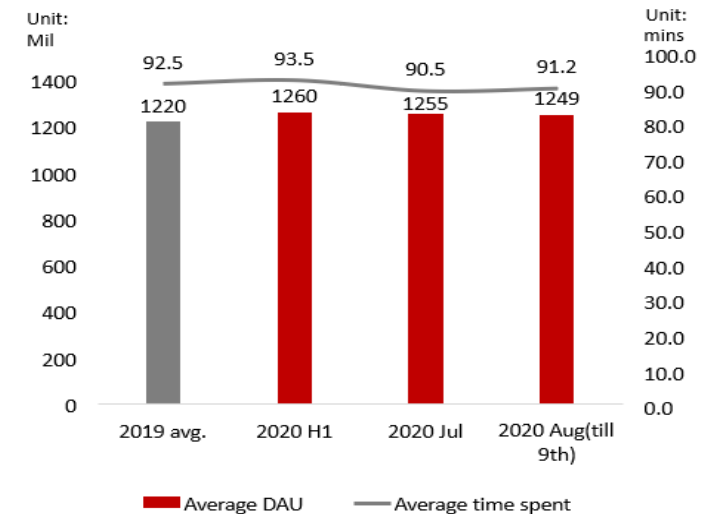
- **Market landscape:** dominated by BATS (Baidu, Alibaba, Tencent and Sina), the core of China's social and digital landscape.
- **Major digital market players:** WeChat, dominating and evolving, and still relevant Weibo measure the pulse of what's viral.
- **Main market:** E-commerce categories reflect complexity of China's retail market; video continues to rise as it fragments.
- **Research popular:** "Ask Me Anything" sites have reinvigorated
- **Popularity marketing:** KOLs/influencers are mainstream means for companies to attract younger audiences and generate greater profits



Digital Landscape of China Market

- Overall, digital media consumption has strongly increased vs. 2019. Social networking apps maintain their strength and high levels of usage.
- WeChat mini programs are the standout performer. Savvy brands have worked out behavior and trends and developed mini apps to meet them.
- Short form video apps, such as Douyin, Kwai and Watermelon Video, continue to grow, driven by longer use times. They are the key means to break through clutter and noise to gain audience attention.
- Live streaming continues its growth momentum and more brands in all categories use it in comms activities on various platforms.

2020 Social Networking Apps User Behavior





AOT Social Media in China



Engaging Chinese Consumers During The Pandemic:

With intense travel restrictions in place the whole year, Chinese consumers were only able to dream of traveling to Arizona.

In order to inspire Chinese consumers' travel dreams and ensure that Arizona is on the map when they can travel again, we executed on the following strategies from July 2020 to June 2021:

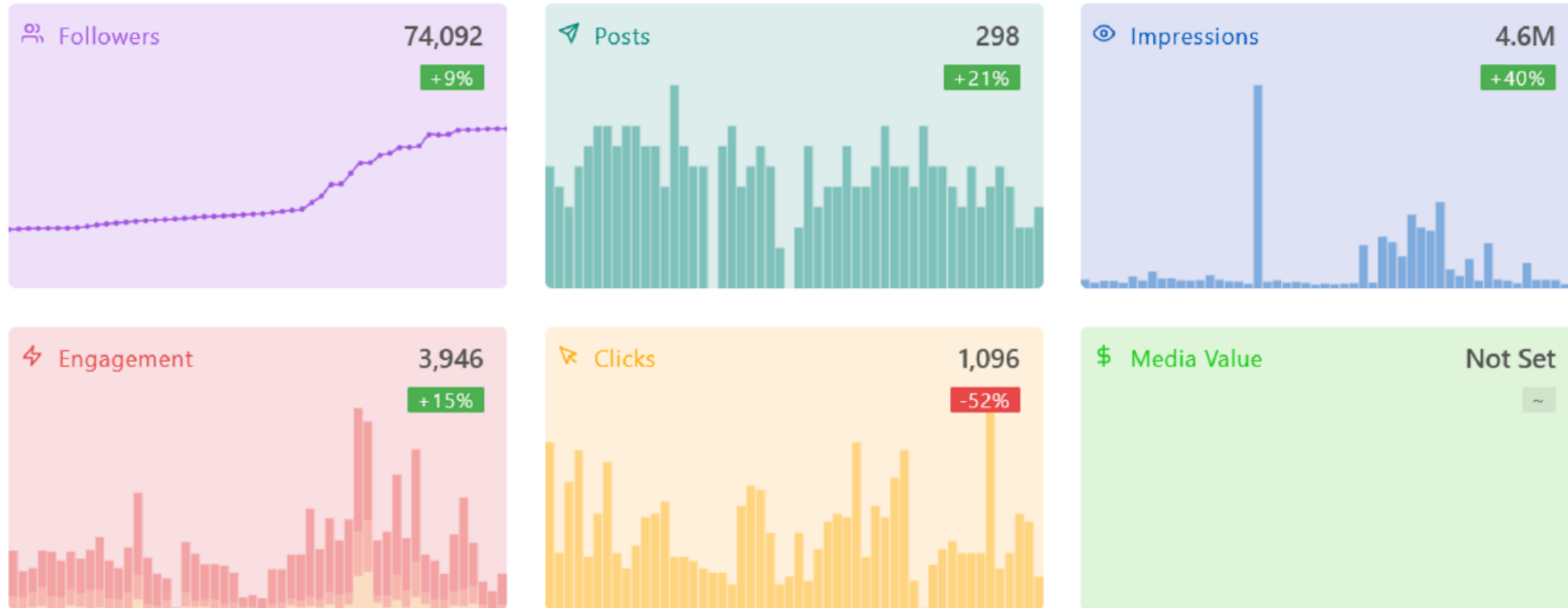
- Maintain our social media presence and focus on travel inspiration and dreaming
- Educate the market via in-depth articles
- Create a mobile app (within WeChat) to educate the travel trade and consumers and allow for dynamic itinerary planning
- Target Chinese consumers in North America for regional travel via programmatic ads on Chinese websites in North America

Staying On the Minds of Chinese Travelers Via Short, Engaging Weibo Content



01 Jul 2020 - 30 Jun 2021 (Weekly)

The Visit Arizona Weibo account gained a total of 6,669 followers in FY21



Trip Inspiration: Travel Dreaming Via In-Depth WeChat Articles

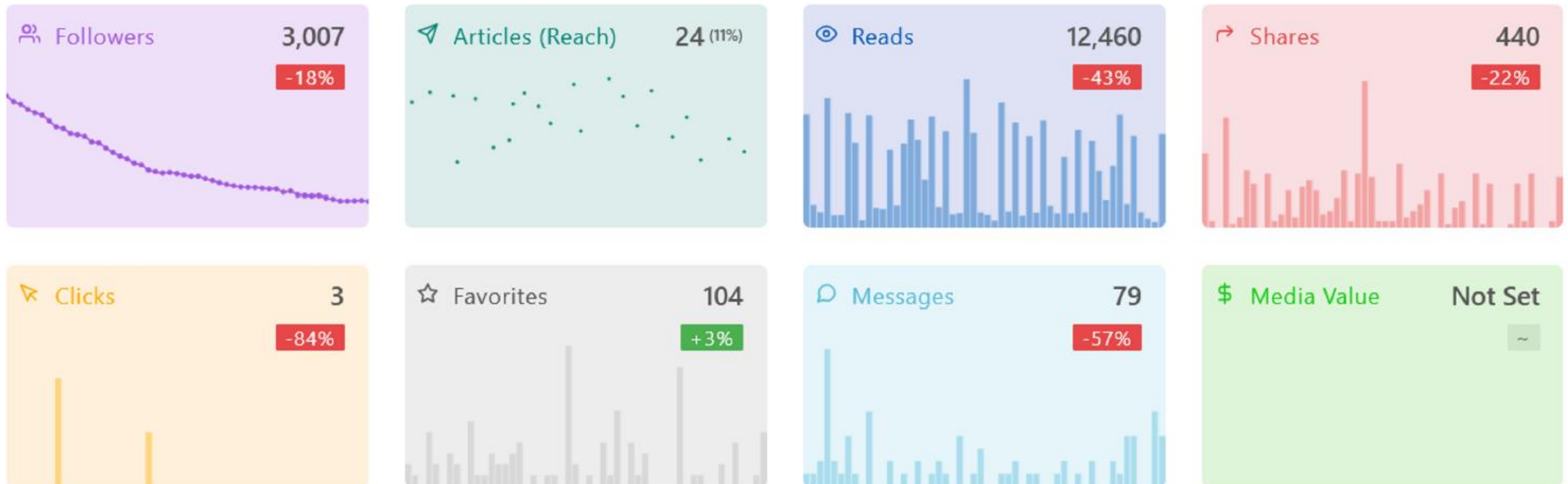


Arizona WeChat Overview

01 Jul 2020 - 30 Jun 2021 (Weekly)

The number of WeChat fans and engagement decreased, but the number of favorites increased 4% in FY21.

The main reason is that with intense travel restrictions in place the whole year, Chinese consumers were only able to dream of traveling to Arizona.



Arizona Storytelling: Top Performing WeChat Posts in the Last Year

Lists of tourist spots typically perform better than single destination articles



5 MUST EAT FOODS IN ARIZONA

Read 470 times
Shared 31 times
7/29/2020



BEGINNER'S GUIDE TO ARIZONA'S OUTDOORS

Read 454 times
Shared 15 times
1/23/2021



48H IN PRESCOTT

Read 448 times
Shared 17 times
8/21/2020



TOP 5 SWIMMING HOLES FOR SUMMER RESORT

Read 444 times
Shared 15 times
7/11/2020



5 MOST WONDERFUL WINTER HIKES

Read 441 times
Shared 36 times
12/19/2020



5 DAY-TRIP IN TUCSON

Read 429 times
Shared 11 times
10/31/2020

Enhancing Training Via WeChat Mini Program: Allowing For Dynamic Itinerary Planning





Travel Trade

Trade Landscape of China Market

- OTA Concentration: Ctrip, Fliggy and Tuniu represent over 80% of China's OTA market
- Other Online Booking Channels: traditional travel agencies have developed own online channels but lag behind OTAs



China Market Travel Trade

FY21 Sales & Marketing Overview:

- Total number of trade Fams hosted: 0
- Total number of trade show / exhibitions participated: 0
- Total number of online training/webinars: 87
- Total number of agent staff trained: 263
- Total number of offline joint events: 3

Activities postponed due to Covid-19:

- ILTM 2021
- Post-IPW Trade and Media Fam Trip 2021
- IPW 2021
- China Sales Mission 2021

FY 21 Trade Activities

Online Training Webinars

Since the Covid-19 outbreak, AOT China has conducted monthly webinars to educate travel trade partners about the destination and to inspire them. Besides building connections during this period, the activities also show AOT support in providing updated destination information and learning opportunities.

- Worked with 66 travel agencies, OTAs and tour operators.
- As of June 30, trained 263 sales/product staff in 87 live webinars.
- Training topics included: General Presentation, Dark Skies, Adventure, Road Trips and Lesser-Known Arizona, Outdoor, Luxury Hotels and shopping, national parks and monuments, tribal, etc.



FY 21 Trade Activities

U.S .Embassy Co-op & Offline Events –

“Friends in Southwest China” roadshow

AOT Beijing attended the “Friends in Southwest China” roadshow hosted by Agricultural Trade Office of U.S. Embassy Beijing on Apr. 6 in Chengdu. At a booth shared with U.S. Meat Export Federation, AOT Beijing connected with local invited partners from tourism, international trading and education industries, to promote the tourism resources. For future tourism development, AOT Beijing also connected with 20+ exhibitors from agricultural associations and wineries. Around 500 local participants attended day-time events.



FY 21 Trade Activities

Trade Round Table Dinner in Chengdu - April 6, 2021

- Venue: Chairman's Restaurant, TaiKoo Li, Chengdu
- Eleven tour operators and airline partners attended the round table dinner which featured a destination presentation and updates on AOT China's activities. U.S. commerce official Keenton Chiang also attended.
- AOT China reported on its activities during the pandemic, including online destination training for travel trade partners, liaison with travel agencies, and sending regular information to media.
- It presented a short-term action plan for China market, including consultancy update on Weibo and WeChat, launch of WeChat mini program (expected before May 2021), preparation for launch of AOT expert course in mini program, etc.
- AOT logoed gifts – notebooks, key chain, sports arm bag – were shared.



FY 21 Trade Activities

Discover America, a re-opened Study Destination

- AOT China presented at the Discover America Beijing event hosted by the U.S. Embassy Commercial Office on Sunday, May 16, 2021. Education USA presented the university resources of Arizona. More than 400 students and families attended.
- On behalf of AOT, AVIAREPS introduced Arizona as a tourism + study destination and interacted with attendees at the booth. Arizona tourism information and WeChat and Weibo QR codes were shared. Branded notebooks and sports arm bags were offered as lucky draw prizes.
- With the help of AOT, Northern Arizona University (NAU) also participated, explaining basic information and advantages, and adding to the lucky draw.
- AVIAREPS connected with California education organizations and community colleges, potential new partners for student tours and future destination promotions.





Media

Media Landscape of China Market

- State-owned media still dominate major media platforms and reach most of the population.
- Convergence media and convergence journalism is active in China, migrating to online/digital platforms and including KOLs and Influencers.
- Social media: WeChat remains dominant with Weibo, and new platforms such as RED, Zhihu (i.e., Do You Know), Douyin (TikTok), and Kuaishou are thriving.
- Short video apps such as Douyin and Kuaishou have become extremely popular in the past 2 years.
- Travel trade media: the limited range of travel trade media in China precisely targets industry people.

FY 21 Media Activities - KOL Co-op

Sina Weibo Posts with various core messages:

Really wanna go to Arizona again when everything is recovered!

Miss the outdoor adventure in Arizona, let me share some interesting stories about that fantastic destination and hope you could visit there soon!

Discover these natural landscapes in Arizona

Lesser-known destinations in the Grand Canyon State: Somewhere you don't know

Wining and Dining Adventures in Arizona

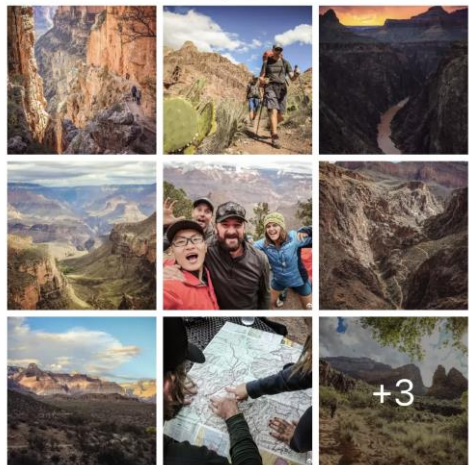
超级小包总
20-5-29 来自iPhone客户端

#在家云旅行# 随着天气渐渐变热，大家出行的热情也越来越高了。去户外呼吸一下新鲜空气，广阔天地，大有可为！回想起上次去亚利桑那的大峡谷地区探索也是这样的初夏，那次极限挑战的回忆至今难忘。亚利桑那州也是受疫情影响后较早复工的几个地方之一，目前已逐步解禁并恢复对外开放，他们今年又更新了 ... 全文



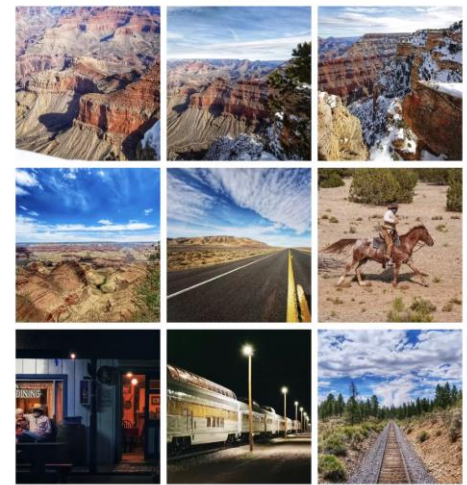
尤添麟
1-1 来自微博 weibo.com

不能出去玩儿，那就来一波#回忆杀# 在美国亚利桑那大峡谷，用4天的时间，露营+徒步28英里，从北到南，从山顶到谷底再到另一侧山顶，Rim to Rim才是打开这里的正确方式。时间越长，越能发现峡谷里的美。峡谷里没有信号，但其实也不需要信号，这种与世隔绝的感觉并不常有，何不好好享受？ ... 全文



摄影之友
20-11-13 来自iPhone客户端

说到自然风光，位于亚利桑那州的大峡谷国家公园，一定是要被再三提及的。作为世界自然遗产，这里拥有壮阔的#自然风光#，数百万年形成的令人称奇的地貌，以及多样的生物。翻翻之前拍摄的相册，给大家来一波回忆杀吧~ @亚利桑那州旅游局



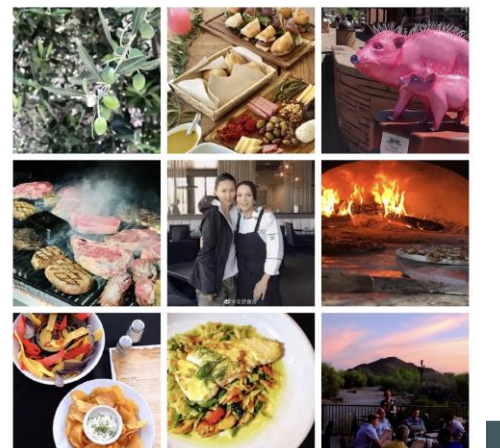
小雷旅行
20-9-24 来自微博 weibo.com

#小众宝藏旅行地#
#美国# 亚利桑那州是全美第六大州，到处可见摄人心魄的大自然美景：大峡谷、纪念碑谷、奇里卡瓦山脉、塞多纳（Sedona）的红岩等。在这壮阔的美国西部有一个国家历史地标不得不提：墓碑镇（Tombstone）因一百年多前（1881）O.K Corral 围栏的一场枪战而闻名于世，好莱坞... 全文



文匠食游
2-27 已编辑

连绵阴雨天，让我怀念起@亚利桑那州旅游局 耀眼的阳光、错落的山石，纯天然的美味...在QueenCreek 橄榄油农庄一览橄榄油制作、品尝不同橄榄油在舌尖的滋味，吃一顿Chef用天然有机食材做的简餐，就连饮料都是自仙人掌的果实，酸甜好喝！附近还有个由工厂改建的家庭式农场里，不仅可以品尝到来自周围邻居 ... 全文



FY 21 Media Activities

Media Publicity: US\$0.84 million Ad Value

Number of Impressions: 80 million

孤独星球杂志
2020-05-24

美国纪念碑谷

163号公路穿过亚利桑那州与犹他州的边界，将我们带到纳瓦霍人口中“岩石之间的山谷”——纪念碑谷。在这里，史诗般的风景被贫瘠的土地衬得更加壮丽：大小不一的砖红色山岩犹如一个个纺锤，每个夜晚群星从山谷深处升起，落入无垠的天幕。



TRAVEL WEEKLY CHINA 旅讯

酒店 HOTELS

美国新闻与世界报道》(US News & World Report)近期公布了2021年顶级酒店排行榜，并授予亚利桑那州的16家酒店金奖，使之位列全美酒店的前10%。

亚利桑那州16家酒店获颁金奖

Mar 31, 2021



每个酒店的考量因素包括酒店等级、奖项、旅业专家的认可度和宾客评价，每项类别的得分相加进而得出最终评分。

“亚利桑那州的度假酒店不仅提供无与伦比的入住体验，而且在疫情期间，他们对保障宾客安全和加强清洁措施的投入力度也是前所未有的。”亚利桑那州旅游局的局长黛比·约翰逊 (Debbie Johnson) 表示道，“对于正在计划度假的人们而言，这些令人赞叹的酒店正是亚利桑那作为旅游目的地愿望清单首选的缘由。”

China.com 中华网

PC版

亚利桑那州 大峡谷国家公园 推出系列视频在线演示匠艺文化

2021-03-26 | 来源：消费日报网

责任编辑：柯鹏

位于亚利桑那州的大峡谷国家公园 Grand Canyon National Park 是广受游客喜爱的景点之一。近期大峡谷国家公园在沙漠景观Desert View的文化演示活动中推出“艺术背后的历史”系列视频。视频通过和来自大峡谷11个传统部落的传承人的访谈，介绍各个部落的历史及匠艺亮点，将美国西南地区的本土艺术通过符号、图案和设计，呈现于民众的日常生活以及信仰和愿景之中。这项文化遗产演示活动为更多的观众提供了全新的在线渠道，令他们有机会深入了解每个部落的文化、历史、技艺、知识和原住民在创造每一种工艺过程中所付出的努力。

环球旅游日报
Travelworld.com

亚利桑那州的豪华露营

2020-12-29 14:44 194次阅读 来源：环球日报 作者：张军

您是否既想亲近大自然，又不愿舍弃豪华的住宿体验？“豪华露营”为此横空出世——它将“豪华”和“露营”完美结合，让您两全其美，一举兼得！宽敞的帐篷、蓬松的床铺、私人厨师，想要的一切应有尽有，让您在大自然中尽情放松享受。

亚利桑那豪华探险Arizona Luxury Expeditions可为亚利桑那州的各个地点提供移动式豪华露营，尤其是大峡谷、纪念碑谷、佩吉市和塞多纳，它们更是露营的天堂胜地。宾客可以下榻于“狩猎”风格的探险帐篷中，每个帐篷都配备生活必需品，如配套齐全的床铺、风扇、毛巾、照明设备以及设施齐全的淋浴房。露营地还提供门房服务，确保客人享受真正的无忧旅行。门房服务包含餐饮和专业的向导服务，同时提供活动规划和组织，涵盖直升机、吉普车、骑马以及漂流等活动。

Grand Canyon Under Canvas是一个绝佳的豪华露营选项。它位于大峡谷国家公园附近，可为所有冒险家提供尽善尽美的现代住宿体验！露营地选在僻静的松树和杜松林之中，占地约160英亩(约64.7公顷)。提供五种住宿选项，无论客人选择哪种帐篷，他们都能收获与众不同的体验。营地位置便利，距世界七大自然奇观之一的大峡谷南入口仅约20分钟的车程。该营地季节性开放。

图源：Under Canvas大峡谷豪华露营地帐篷外景

分享按钮：微信、QQ、微博、Facebook、Twitter、LinkedIn、Email

FY 21 Media Activities

Media Publicity - Cont'd

中国网

生活

中国

生活

中国

生活

资讯 尚品 知味 畅旅 健体 养生 良缘 亲子 萌宠 情感 品酩 珠宝 书香 收藏 家居 策划

亚利桑那州的美食

发布时间：2020-09-23 17:07:52 | 来源：北国网 | 责任编辑：吕欣

亚利桑那州图森市被联合国教科文组织UNESCO授予“世界美食之都”称号

图森市(Tucson)因其多种多样的活动而闻名，因为当地丰富的农业传承，以及多元的美食传统及餐饮文化，图森市在2015年曾获得由联合国教科文组织授予的世界美食之都称号。在图森你可以轻松找到有着各种菜系选择的国际化餐馆,或者订到詹姆斯·比尔德 James Beard Foundation榜上有名的顶级餐厅的座位。观光的同时，也能在这个被索诺兰沙漠所围绕的城市里进行一次美食探险!

中国网生活频道

中国网生活频道，中国式生活。最新生活服务资讯，全面展示了包括衣、食、住、行、穿等生活方式，捕捉生活之美，分享生活好物，展现中国人美好幸福生活。

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SELF STYLE.com.cn

页 | 资讯 | 服饰 | 护肤 | 美妆 | 配饰 | 奢品 | 科技 | 家居 | 美体 | 娱乐 | 美食 | 生

首页 > 资讯 > 查看内容

1403

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分享到

微信 新浪微博 QQ空间 人人网

2020-10-28 14:53

作者：佚名 来源：悦己时尚网

自20世纪初以来，美国西南部的沙漠地区一直是休闲、放松和健康生活的代名词。亚利桑那州的气候炎热干燥，同时也是一个丰富而密集的Spa疗养圣地，要说亚利桑那引领Spa潮流也是毫不为过。

亚利桑那州坐拥三大水疗中心，分别是位于斯科茨代尔的腓尼基水疗(The Phoenician Spa)；位于图森的丽思卡尔顿鸽子山水疗(The Ritz-Carlton Dove Mountain Spa)以及位于钱德勒的喜来登度假大酒店(Aji Spa) 它们都荣获2020年《福布斯》的五星奖项。

中国都市时尚网

WWW.CHINA URBAN FASHION.COM

热门搜索：品牌 海苔 泰国


首页 新闻 服饰 美容 都市 奢品 娱乐 生活 家居 汽车 社会

中国都市时尚网 > 新闻 > 国内新闻 >> 内容

亚利桑那州的奢华度假牧场

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唐格维德牧场Tanque Verde Ranch坐落于图森郊外的仙人掌国家公园和科罗纳多国家森林公园附近的丽坎山脉(Rincon Mountains)之间。这座牧场建于1868年，致力于为客人提供豪华的住宿体验、无与伦比的便利设施以及各种各样的活动，如骑马、山地自行车、钓鱼和远足。La Sonora水疗中心位于牧场之内，一天疲惫的骑马行程结束后可以在这里尽情放松休憩。



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